



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Guardian Bissegger, Reed A. (Pro Per – Maternal Grandfather – Petitioner)
Guardian Bissegger, Gracie A. (Pro Per – Maternal Grandmother – Petitioner)

	See petition for details.		NEEDS/PROBLEMS/COMMENTS:					
			1. Need Notice of Hearing.					
			2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing per Probate Code §§ 2352(c), 1460, 1511 to: <ul style="list-style-type: none">- David M. Lopez (Father)- Christina Rodriguez (Mother)- Paternal Grandparents					
Aff.Sub.Wit.			<u>Note:</u> If granted, the Court will set a status hearing for the filing of a guardianship or its equivalent in Nebraska pursuant to Probate Code §2352(d) as follows: <ul style="list-style-type: none">• Thursday, June 9, 2016					
✓ Verified								
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Aff. Posting		Reviewed by: skc						
Status Rpt		Reviewed on: 2/1/16						
UCCJEA		Updates:						
Citation		Recommendation:						
FTB Notice		File 2-Lopez						

Attorney Kevin Urbatsch, of San Francisco (for Petitioner Wells Fargo Bank, Trustee)

**Petition for Order Authorizing Disbursement of Trust Funds for Home Modifications;
and Amendment to Petition for Order Authorizing Disbursement of Trust Funds for
Home Modifications**

		<p>WELLS FARGO BANK, Trustee, is Petitioner.</p> <p>Petitioner seeks an order under Probate Code § 17200 authorizing the disbursement of Trust funds for home modifications <i>[and for payment of attorney fees to William L. Winslow]</i> for the benefit of Trust Beneficiary SANDY MOUA, based upon the following:</p> <ul style="list-style-type: none"> The Trust was funded with \$2,114,386.77 in proceeds from a litigation settlement in Case 07CECG01886, and is a discretionary, spendthrift trust for the purpose of supplementing public resources and benefits when such resources and benefits are unavailable or insufficient to provide for SANDY'S special needs; SANDY resides with her parents and siblings <i>[in the home owned by the Trust]</i>; as a result of being hit by a car while she was crossing the street, Sandy suffers from several permanent severe disabilities that substantially impair her ability to provide for her own care, including significant cognitive impairment, spastic quadriparesis, and brain damage; she is not expected to experience significant future improvement in her condition; <i>[Order Settling Third Account and Report of Trustee filed 6/19/2015]</i> found the balance of the trust estate as of the end of the Third Account period was \$2,121,160.68, of which \$158,399.60 consisted of cash; Petitioner requests authorization to expend up to \$10,000.00 on home modifications, as there are sufficient trust funds to pay for the home modifications and to continue to provide for the special needs of SANDY <i>[remainder of request for home modification funds omitted]</i>; <p align="center">~Please see additional page~</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 12/17/2015. Minute Order <i>[Judge Snauffer]</i> states the Court approves the request for roof/patio repair due to impending weather conditions and signs the order that is specific to that portion of the request. The matter is continued as to the remaining requests for consideration by Judge Kazanjian.</p> <p>Note Re Future Hearings:</p> <ul style="list-style-type: none"> A Probate Status Hearing for the Court's reconsideration of any appropriate rent reductions is set on 6/21/2016 at 9:00 a.m. in Department 303. A Probate Status Hearing for the filing of the Fourth Account (covering period 12/1/2014 through 11/30/2016) is set on 1/24/2017 at 9:00 a.m. in Department 303. <p align="center">~Please see additional page~</p>	
Cont. from 121715				
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	Order			X
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			

Amendment to Petition for Order Authorizing Disbursement of Trust Funds for Home Modifications filed 11/18/2015 amends the Petition to seek attorneys' fees to be paid for the purposes of advocating to recover public benefits for Trust Beneficiary SANDY MOUA, pursuant to Trust terms requiring that all fees and costs paid out of the Trust be approved by the Court prior to disbursement:

- Trustee **WELLS FARGO** retained Attorney **WILLIAM L. WINSLOW** [of Los Angeles] to represent **SANDY** regarding a claim for restoration of Supplemental Security Income (SSI) benefit eligibility by the Social Security Administration (SSA) and to defend **SANDY** against an overpayment claim by SSA;
- Mr. Winslow was formerly a partner of **FARMER & RIDLEY**, a firm no longer active, and is currently of counsel at **GIFFORD, DEARING & ABERNATHY**; as described more fully in the Declaration of William L. Winslow (attached as Exhibit A), Petitioner requests that approved fees for legal services rendered by **FARMER & RIDLEY** be made out to "**FRPR, LLP and/or WILLIAM L. WINSLOW**" in accordance with an agreement for division of his fees;
- Petitioner seeks an order of this Court to authorize and direct Trustee to pay **GIFFORD, DEARING & ABERNATHY** attorneys' fees in the amount of **\$10,333.50** and costs in the amount of **\$67.92** (for Federal Express shipments);
- Additionally, Petitioner seeks an order of this Court to authorize and direct Trustee to pay "**FRPR, LLP and/or WILLIAM L. WINSLOW**" the sum of **\$1,203.50** for legal services rendered by **FARMER & RIDLEY**;
- The rate for his services is **\$415.00** per hour; the combined total of all services rendered and costs advanced is **\$11,604.92**;
- All services rendered by **WILLIAM L. WINSLOW** for which fees are being sought in this amendment to the Petition occurred prior to the [Order Settling Third Account and Report of Trustee filed 6/19/2015];
- Petitioner is not seeking separate payment for **JIM HYUCK** in this amendment, as his fees have already been reviewed by this Court in the [Order Settling Third Account and Report of Trustee filed 6/19/2015].

Declaration of William L. Winslow, attached as Exhibit A to the Amendment to Petition for Order Authorizing Disbursement of Trust Funds filed 11/18/2015 states:

- He has a subspecialty practice that includes drafting special needs trusts and government benefits issues; since the 1993 enactment of safe harbors for SNTs in state and federal law, he has represented disabled individuals whose eligibility for SSI was challenged by the SSA over some aspect of the SNT which the disabled person was a beneficiary, approximately 12 times; of these, about 6 disputes arose within the last 2 to 3 years; (resume attached as Exhibit A);
- The rate for his services is **\$415.00** per hour (copy of contract for legal services attached as Exhibit B); a Work-in-Progress is attached as Exhibit C showing his time in the matter while at **FARMER & RIDLEY**; a statement showing his time on this matter while at **GIFFORD, DEARING & ABERNATHY** is attached as Exhibit D; [Note: Attorney Kim Herold was paid **\$1,625.00** in fees for services requested in her Petition for Modification of Special Needs Trust, per Order filed 7/10/2013; services appear to be the same issues for which William Winslow is requesting fees of **\$1,203.50** at this time itemized at Exhibit C of Mr. Winslow's Declaration for the period 3/27/2013 – 10/30/2013];
- He was retained by **WELLS FARGO BANK**, Trustee, to represent the Trust Beneficiary regarding her claim for restoration of her eligibility for SSI benefits by SSA, and to defend her against an overpayment claim by SSA;
- In 2012, SSA cut off **SANDY MOUA'S** SSI benefits on the ground that she had excess resources;
- Working with a government benefits expert, **JAMES HYUCK**, the Trustee took steps to cure possible grounds for SSA's claims; these steps should have caused SSA to reinstate SSI eligibility, but it did not do so;

~Please see additional page~

Amendment to Petition for Order Authorizing Disbursement of Trust Funds for Home Modifications filed

Dept. 303, 9:00 a.m. Thursday, February 4, 2016

11/18/2015, continued:

- He requested a hearing before an Administrative Law Judge, prepared a Statement of Facts and Memorandum of Points and Authorities, and attended a hearing in Fresno; *[Please refer to detailed facts of the SSA claim as stated by Mr. Winslow are contained on Page 2 - 3 of Declaration];*
- He entered into an agreement regarding fees for legal services with **FARMER & RIDLEY** which is still in force, and pursuant to his agreement he requests the Court order a payment of approved fees for legal services rendered to "**FRPR, LLP and/or WILLIAM L. WINSLOW;**"
- He rendered **2.9** hours of professional services at **\$415.00** per hour totaling **\$1,203.50**, and **GIFFORD, DEARING & ABERNATHY** rendered **24.9** hours of professional services totaling **\$10,333.50**; and the combined total of all services rendered is **\$11,537.00**; in addition he seeks **\$67.92** for Federal Express shipments for which he seeks reimbursement.

Petitioner prays for an Order that:

1. [The Trustee of the **2009 SANDY MOUA SPECIAL NEEDS TRUST** is authorized to distribute up to **\$10,000.00** on home modifications to add a patio covering and extend the patio *[on the balcony level]* at the home in which **SANDY MOUA** resides]; *[Note: Order Authorizing Disbursement of Trust Funds for Home Modification was signed by Judge Snauffer on 12/17/2015, which authorizes the Trustee to spend up to **\$10,000.00** on home modifications to add a patio covering and extend the patio at the home in which Sandy Moua resides.]*
2. The Trustee is authorized and directed to pay **GIFFORD, DEARING & ABERNATHY** attorneys' fees in the amount of **\$10,333.50** and costs in the amount of **\$67.92** for services rendered to the Trustee; and
3. The Trustee is authorized and directed to pay "**FRPR, LLP and/or WILLIAM L. WINSLOW**" the sum of **\$1,203.50** for legal services rendered by **FARMER & RIDLEY**.

NEEDS/PROBLEMS/COMMENTS, continued:

1. The Amendment to Petition for Order Authorizing Disbursement of Trust Funds for Home Modifications filed 11/18/2015 amends the *Petition* to seek attorneys' fees to be paid to **WILLIAM L. WINSLOW** regarding a claim for restoration of Supplemental Security Income (SSI) for the Trust Beneficiary. It appears the amendment to the *Petition* is a separate petition seeking an order, for which a separate **\$435.00** filing fee should be paid to the Court.
2. *Exhibit D*, Statement from the Law Offices of **GIFFORD, DEARING & ABERNATHY** includes an itemization dated 1/15/2014 for **\$1,760.00** for travel to Fresno *[from Los Angeles]* for hearing re SSI; and an itemization dated 1/16/2014 for **\$1,760.00** for return travel from Fresno, for a total of **\$3,520.00** for travel costs; the Court typically disallows travel costs, as evidenced by Local Rule 7.17(B)(5) providing that travel costs to and from court are not reimbursable.
3. Attorney Winslow requests reimbursement of **\$67.92** for Federal Express shipments, which alternative delivery service is only allowable as a cost in the Court's discretion pursuant to Local Rule 7.17(C)(2).
4. Need revised proposed order.

Status Hearing Re: Filing of the Third Account

		PUBLIC GUARDIAN is conservator of the estate.	NEEDS/PROBLEMS/COMMENTS:	
		Conservator's Second Account was settled on 10/2/13 and at that time the Court set this status hearing for the filing of the Third Account.	1. Need Third Account.	
Cont. from 110615		<p>Status Report filed 1/29/16 states the PG was in the process of preparing the account when she discovered that Principle Financial Group had credited the Conservatee with some shares of stock in connection with a whole life policy he formerly owned. A supplemental I&A was never prepared for the stock. Therefore, the supplemental I&A will need to be prepared and sent to the Probate Referee. When returned, the PG can then prepare the account. A 90-day continuance is requested.</p>		
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CI Report				Reviewed by: skc Reviewed on: 1/29/16 Updates: 2/1/16 Recommendation: File 4 – Barron
9202				
Order				
Aff. Posting				
Status Rpt				
UCCJEA				
Citation				
FTB Notice				

**5A Macario Bejarano, Aliyah Bejarano, Case No. 10CEPR00774
Nathan Ceja, Jesse Bravo, and Katalina Bravo (GUARD/P)**

Petitioner Rodriguez, Felipe (Pro Per – Great Uncle – Petitioner)
Objector Coloa, Clint (Pro Per – Father – Objector)

Petition for Appointment of Guardian of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: Note: This petition pertains to Nathan only. Page B is a separate petition for guardianship of Jesse and Katalina filed by Martin and Chrisy Ceja. Guardianship of Macario and Aliyah was previously granted to Mary Lopez Hernandez on 12/7/10. 1. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Cecilia Ceja (Mother) 2. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Martin Ceja (Maternal Grandfather) - Macario Bejarano (sibling) - Mary Lopez Hernandez (Guardian of Macario) - Other siblings age 12 or older. (See Objection re additional half-siblings.) 3. If diligence is not found, need notice to paternal grandparents per Probate Code §1511 or further diligence.	
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	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
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	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 2/1/16	
			Updates:	
			Recommendation:	
			File 5- Bejarano & Ceja	

5A

Petitioner Ceja, Martin (Pro Per – Great Uncle – Petitioner)
Petitioner Ceja, Chrisy (Pro Per – Great Aunt – Petitioner)

Petition for Appointment of Guardian of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: <u>Note</u> : This petition pertains to Jesse and Katalina only. Page A is a separate petition for guardianship of Nathan by Felipe Rodriguez. Guardianship of Macario and Aliyah was previously granted to Mary Lopez Hernandez on 12/7/10. 1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Alex Bravo (Father) - Cecilia Ceja (Mother) 3. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Paternal Grandfather - Paternal Grandmother - Martin Ceja (Maternal Grandfather) - Virginia Rangel (Maternal Grandmother) - Macario Bejarano (sibling) - Mary Lopez Hernandez (Guardian of Macario)
	Aff.Sub.Wit.			
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	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg	X		
	Aff.Mail	X		
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	Sp.Ntc.			
	Pers.Serv.	X		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
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✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
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✓	UCCJEA			
	Citation			
	FTB Notice			

Attorney: Linda K. Durost (for Petitioner/Administrator Toni Richardson)

Objector: Bill Richardson (pro per)

Amended First and Final Report and Account of Administrator; for Allowance of Statutory Attorneys' Fees and Costs; Allowance of Statutory Administrator's Fees and for Final Distribution

DOD: 6/2/11		TONI RICHARDSON , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Continued from 1/7/16. Minute order states Ms. Durost and Ms. Richardson are in dispute as to the information that has been provided and what is still needed, and the work that remains to be completed. Ms. Durost will be filing a motion to withdraw; Ms. Richardson is admonished that she could be sanctioned and/or removed for failure to file the accounting. Ms. Durost is to file her motion before the 2/4/16 hearing. As of 2/1/16 Ms. Durost has not filed her motion and the following issues remain: Need Second Amended First Accounting based on but not limited to the following: 1. Inventories and appraisals filed total \$182,550.00 and not \$177,550.00 as stated in the accounting. (Reappraisal for sale is just for the sale of the real property. The inventory and appraisal with the date of death value is the correct inventory to use for account purposes.) <p align="center">Please see additional page</p>
		Account period 2/22/12 – 2/2015	
Cont. from 072215, 090915, 100715, 010716		Accounting - \$178,548.26	
		Beginning POH - \$177,550.00	
		Ending POH - \$106,186.69	
<input type="checkbox"/>	Aff.Sub.Wit.	Attorney - \$4,562.00	
<input checked="" type="checkbox"/>	Verified	Administrator - \$4,562.00	
<input checked="" type="checkbox"/>	Inventory	Attorney costs (filing fee) - \$435.00	
<input checked="" type="checkbox"/>	PTC	Reimbursement of costs to Administrator - \$20,488.00	
<input checked="" type="checkbox"/>	Not.Cred.		
Notice of Hrg			
Aff.Mail			
Aff.Pub.		Distribution, pursuant to intestate succession, is to:	
Sp.Ntc.		Toni Richardson - \$36,794.14	
Pers.Serv.		Bill Richardson - \$36,794.14	
Conf. Screen			
<input checked="" type="checkbox"/>	Letters 2/22/12		
Duties/Supp			
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Reviewed by: KT
Reviewed on: 2/1/16
Updates:
Recommendation:
File 6 - Bonham

NEEDS/PROBLEMS/COMMENTS (cont):

2. Statutory fees are calculated incorrectly. Attorney incorrectly included the mortgage payoff as a loss on sale. The correct statutory fees should be \$6,339.79. Calculated on the fee base as follows:

I & A	-	\$182,550.00
Receipts	-	\$ 543.03
Gains on sale	-	\$ 400.00
Less loss on sale of real property	-	<u>\$ 5,500.00</u>
Total fee base	-	\$177,993.03
3. Need Allowance or Rejection of Creditor's Claim for the Creditor's Claim of DMC filed on 4/27/12. California Rules of Court, Rule 7.401 states that for each creditor's claim filed the Administrator must (1) Allow or reject the claim (2) serve a copy of the claim on the creditor (3) file a copy with proof of service with the court.
4. Escrow closing statement shows that the Administrator received \$110,594.07 from the sale of the real property. The proceeds were ordered into a blocked account. Receipt for Blocked account shows a deposit of \$105,594.07. A difference of \$5,000. Petitioner states when the sale proceeds were deposited, prior to it being blocked, the bank automatically withdrew \$2,300 to pay the balance of the Decedent's credit card. Petitioner states she paid Sam LaPlaca \$1,000 for roofing work he had done on the residence and another \$1,700.00 for other repairs. Examiner note: The declaration of Petitioner for reimbursement of costs also include a \$1,000 payment to Sam LaPlaca Construction for roofing repairs. Is the \$1,000 that petition is asking to be reimbursed in addition to the \$1,000 paid from the proceeds of the real property sale? Court may require receipts for the repairs done from Sam LaPlaca Construction.
5. Warren Felger was the former attorney in this case. Therefore he is entitled to a portion of the statutory attorney fees. Need agreement from the attorneys as to apportionment of the attorney fees. – Attorney Durost states that attempts to discuss the fees with Mr. Felger have gone unanswered. Mr. Felger made numerous errors and failed to communicate with petitioner and advise petitioner properly with respect to the account management. Attorney Durost requests that no part of the statutory fees be attributable to Mr. Felger.
6. Creditor's claim of Toni Richardson includes an entry on 3/10/13 for \$500 to Warren Felger for filing fees. Petitioner states she paid Mr. Felger \$500 for filing fees that apparently he never paid.
7. Petitioner states she distributed \$5,000 and jewelry valued at \$250.00 to her brother Bill Richardson. Need receipts for preliminary distribution.

Please see additional page

Objections of Bill Richardson filed on 7/21/15 alleges the inventory and appraisal filed on 2/10/15 is incorrect in that it failed to disclose the proceeds of the trailer that was sold prior to decedent's death with the proceeds received after the decedent's death. Petitioner also alleges that the proceeds of the trailer - \$5,000 - was given directly to objector. However, Objector contends that the trail was not property of the Decedent, but actually belonged to Frances L. Foster, Decedent's long time live-in boyfriend, who died shortly before the Decedent. Therefore, since the trailer was not the Decedent's property it should not have been included in Petitioner's Second Corrected Inventory and Appraisal and therefore the total value of the Second Inventory and Appraisal (\$7,550) should be reduced by \$5,000.

Petitioner alleges to have distributed $\frac{1}{2}$ of Decedent's jewelry, appraised at \$500 total, to Objector. However, Objector contends to have never received any jewelry. Therefore should not be credited with an advance distribution of Decedent's jewelry. Because Objector received no advance distribution from Decedent's estate, Objector contends that not only is Petitioner not entitled to any equalizing distribution, but that Objector should receive an equalizing advance distribution of \$2,950, in light of Petitioner's advance distributions to herself (vehicle valued at \$1,550; jewelry valued at \$500; and \$900 from the sale of Decedent's personal property).

Probate Examiner Notes dated 5/5/15 identify the fact that the Court ordered proceeds from the sale of the Decedent's home into a blocked account, that Petitioner received \$110,594.07 from the property, and deposited only \$105,594.07. In explaining the whereabouts of the missing \$5,000, Petitioner indicates in her Amended Report that (1) EECU deducted \$2,300 for payment in full on Decedent's EECU credit card balance; and (2) she paid Sam Laplace \$1,000 out of the funds to repair the property's roof, and \$1,700 for other repairs and cleanup on the house. However, Objector contests these claims.

Objector asserts that the Decedent did not owe any balance on an EECU credit card at the time of her death. Additionally, Objector knows Sam Laplace personally, he is Petitioner's son and Objector's nephew. Objector claims Mr. Laplace is not a California licensed contractor, and if he performed the services Petitioner claims to have paid him for, he would be in violation of Assembly Bill 2237, which requires anyone working on a construction project worth \$500 or more to be a licensed contractor. Moreover, Petitioner is in violation of Probate Code §1064(a)(4) by not disclosing the familial relationship with Mr. Laplace in the Amended Report.

Barring satisfactory evidence as to Petitioner's claims regarding the expenditure of the missing \$5,000, Objector requests the amount be charged against the Petitioner's compensation as Administrator, with any remaining charge credited against Petitioner's final distributive share in favor of Objector.

Petitioner seeks \$20,488 in reimbursable administrative costs. Objector specifically contests each and every expense Petitioner has submitted for reimbursement. Objector requests satisfactory evidence to support the correctness of each charge listed in the schedule (explained in greater detail in the objections).

Please see additional page

Objections of Bill Richardson filed on 7/21/15 (Cont.):

Wherefore, Objector prays for an order:

1. Petitioner/Administrator's Second Corrected Inventory and Appraisal be reduced by \$5,000 to reflect the fact that the itemized trailer was not estate property and Objector never received any sale proceeds.
2. Objector be entitled to an equalizing preliminary distribution of \$2,950 to offset the advanced distributions Petitioner/Administrator made to herself.
3. Petitioner produce satisfactory evidence to support her claims regarding the \$5,000 missing from the sale of Decedent's house within 30 days of this Order, or otherwise have that amount charged against her fiduciary compensation and final distributive share if necessary.
4. Petitioner produce satisfactory evidence to support the correctness and legitimacy of each and every charge listed for her reimbursement schedule within 60 days of this Order, or otherwise have any and all unsupported charges disallowed.
5. Costs and attorneys' fees as allowable by law and according to proof.

Status Hearing Re: Informal accounting of closing reserve

DOD: 8/28/11	<p>The Second and Final Account of Co-Executors SUSAN J. QUINN and RHONDA WALLACE was settled on 11/20/14.</p> <p>At the hearing on 11/20/14, the Court set this status hearing for informal accounting of the \$25,000.99 closing reserve pursuant to recent court practices.</p> <p>Status Report filed 11/9/15 states the IRS has made a determination of the income taxes due for 2008, 2009 and 2010 plus penalties, for a total of \$11,754.13. Mr. Knudson has been trying without success to communicate with the IRS concerning the penalties. Finally on or about 11/3/15, contact was made with a Ms. Ware at the IRS. The situation was explained to her, and Mr. Knudson finally believed she was a person who understood the situation.</p> <p>What transpired was this: Following the decedent's death, it was found that she neglected to file her income taxes for several years. The service reported that 2010 had been filed and a refund credited, so the executors filed returns for 2008 and 2009, paid the balance of taxes due, per the returns, giving credit for the refund for 2010. However, in 2012 it was determined that the 2010 return was a fraudulent return. No refund was due the decedent; therefore the funds that had applied to 2008 and 2009 were withdrawn, and the IRS assessed penalties and interest for 2008, 2009, and 2010.</p> <p>The taxes have been paid. Ms. Ware of the IRS urged that a request for abatement of penalties and interest be filed. A letter was sent to the Cincinnati service center on 11/4/15.</p> <p>The reserve balance is \$25,000.99. It is anticipated that the matter will be resolved in the next 60-90 days; either the IRA will waive the penalties and interest, or they won't.</p> <p>It is respectfully requested that the court set such further status hearings as may be appropriate or that further status hearings be waived, in the court's discretion.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order</u> 11/12/15: Counsel represents that all the taxes have been paid and they have money in reserve. If a verified status report is filing indicating the issue is resolved, no appearance is necessary on 2/4/16.</p> <p>As of 1/29/16, nothing further has been filed.</p> <p>1. Need informal accounting of the \$25,000.99 closing reserve. If filed prior to the hearing pursuant to Local Rule 7.5, the status hearing may be taken off calendar.</p> <p>Note: Filing of the informal accounting of closing reserve will not generate a new hearing date.</p>
Cont. from 052015, 111215		
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UCCJEA		
Citation		
FTB Notice		

Reviewed by: skc
Reviewed on: 1/29/16
Updates:
Recommendation:
File 7 - Quinn

[illegible]

Petitioner Genia Kay Cherry (Pro Per)

Petition for Visitation

		GENIA KAY CHERRY, mother, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		JOSEPHINE M. LONGORIA-CONTENTE,	Continued from 12/3/2015. Minute Order states matter is continued per Petitioner's request.
		paternal grandmother, was appointed Guardian on 6/5/2013.	
Cont. from 120315		~Please see Petition for details~	The following issues from the last hearing remain:
	Aff.Sub.Wit.		
✓	Verified		<ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Pursuant to Probate Code §§ 1460 and 1511, need proof of 15 days' service prior to the hearing of the Notice of Hearing with a copy of the Petition for Visitation or Consent and Waiver of Notice, or Declaration of Due Diligence, for: <ul style="list-style-type: none"> • Josephine Longoria-Contente, Guardian.
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
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	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 2/1/16
			Updates:
			Recommendation:
			File 10 – Bell

Attorney Lisa Horton (for Petitioner Meredith McNeil)

Probate Status Hearing Re: Informal Accounting for Closing Reserve

DOD: 4/12/2013	<p>MEREDITH McNEIL, daughter, was appointed Executor on 8/26/2013, and <i>Letters</i> issued on that date.</p> <p>Order Settling the First and Final Account and Report of Executrix, etc., filed 6/25/2015 authorized a closing reserve of \$10,000.00, finding that a status hearing shall be set for an informal accounting of the reserve.</p> <p>Notice of Calendar Setting filed 12/31/2015 set the status hearing for informal accounting of closing reserve on 2/4/2016.</p> <p>Status Hearing Report filed 1/29/2016 states:</p> <ul style="list-style-type: none"> Receipts for all cash distributions have been filed; the <i>Order Settling the First and Final Account</i> was recorded on 8/7/2015, transferring the real property residence to four of the estate beneficiaries; Charles Arthur McNeil has received the Verizon, AT&T, and Westamerica stocks; a receipt for these shares will be filed within 2 weeks; She has been in constant communication with the Executor regarding the status of the final estate tax return; She provided forms to the accountant in October; however, there were some tax documents she and the accountant were waiting on that are finally coming in; The accountant informed her that the return should be completed within 2 weeks; Two other miscellaneous stocks that the Decedent owned recently came to the Executor's attention; 48 shares of Lucent stocks were liquidated and the sum of \$161.07 was recently deposited into the estate account; 6 shares of Frontier Communications stocks were liquidated and a check for \$8.23 was mailed; They are waiting for the final estate tax return to be completed and then the balance of the reserve account can be properly distributed; They request a 30-day continuance of this matter to 3/3/2016 for further status. 	NEEDS/PROBLEMS/COMMENTS:
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Reviewed by: LEG
Reviewed on: 2/1/16
Updates:
Recommendation:
File 11-McNeil

Second Report and Account of Trustee; Petition for Its Settlement and Allowance of Trustee and Attorneys Fees

Age: 20		RONALD DICKEN, PATRICIA DICKEN, and KAREN STEELE , private professional fiduciaries and Co-Trustees, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 011416		Account period: 10/01/14 – 09/30/15	<u>CONTINUED FROM 01/14/16</u>
<input type="checkbox"/>	Aff.Sub.Wit.		<p>Note: Petitioners state that due to the size of the trust estate, the beneficiary would be better served by placing the funds into a blocked account. Petitioners state that they will be filing a Petition to resign as Trustees and for appointment of Choua Yang (brother) as successor Trustee with funds to be placed in a blocked account.</p> <p>Note: If the Petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Thursday, December 1, 2016 at 9:00 am in Dept. 303 for filing of the Third Account and Report of Trustee (if a one year accounting is due); or • Thursday, November 30, 2017 at 9:00 am in Dept. 303 for filing of the Third Account and Report of Trustee (if a two year accounting is due) <p>Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the dates listed, the hearing will be taken off calendar and no appearance will be required.</p>
<input checked="" type="checkbox"/>	Verified	Accounting - \$136,697.36	
<input type="checkbox"/>	Inventory	Beginning POH - \$133,460.67	
<input type="checkbox"/>	PTC	Ending POH - \$123,613.96	
<input type="checkbox"/>	Not.Cred.	(Stifel Nicolaus Investment account and \$9,137.93 cash)	
<input checked="" type="checkbox"/>	Notice of Hrg	Trustee - \$5,706.50 (paid)	
<input checked="" type="checkbox"/>	Aff.Mail	(for 45.35 hours @ \$125.00 per hour; includes travel from Visalia to Fresno to meet with Beneficiary and Choua Yang, brother)	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen	Attorney - \$1,641.50	
<input type="checkbox"/>	Letters	(for 2.2 attorney hours @ \$365.00/hr. and 3.9 attorney hours @ \$215.00/hr.)	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections	Costs - \$200.00	
<input type="checkbox"/>	Video Receipt	(filing fee)	
<input type="checkbox"/>	CI Report	Bond - \$163,506.92	
<input checked="" type="checkbox"/>	2620(c)	(sufficient)	
<input checked="" type="checkbox"/>	Order	<p>Petitioner prays for an Order:</p> <ol style="list-style-type: none"> 1. Approving, allowing and settling the Second Report and Account of the Trustee; 2. Ratifying and approving the compensation of \$5,706.50 paid to Petitioners for services rendered as Trustees; 3. Authorizing and directing Trustees to pay the Attorney fees of \$1,641.50 and reimbursement of costs. 	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: JF

Reviewed on: 02/01/16

Updates:

Recommendation:

File 12- Yang

First and Final Report of Administrator, on Waiver of Accounting; and
Petition for Final Distribution

DOD: 8/6/14		ADRIENNE A. NALBANDIAN , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account is waived.	1. Petition does not contain a statement regarding Probate Code §216 and 9202(b) re: notice to the Director of Victims Compensation and Government Claims Board.
Cont. from		I & A - \$1,146,405.96	
<input type="checkbox"/>	Aff.Sub.Wit.	POH - \$1,134,047.26	
<input checked="" type="checkbox"/>	Verified	Administrator - waives	
<input checked="" type="checkbox"/>	Inventory	Attorney - \$12,000.00 (less than statutory)	
<input checked="" type="checkbox"/>	PTC	Closing - \$734.00	
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	W/	
<input checked="" type="checkbox"/>	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
<input checked="" type="checkbox"/>	Letters	10/16/14	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		

Order to Show Cause – Pre RE: Failure to File Receipt for Blocked Account

Age: 12		<p>REBECCA KERR, maternal aunt and Co-Guardian of the Person, was appointed Guardian of the Estate without bond on 11/12/15, with all funds to be deposited into a blocked account.</p> <p>At the hearing on 11/12/15, the Court set a status hearing re the filing of the receipt for blocked account on 01/07/16.</p> <p>Minute Order from hearing on 01/07/16 set this hearing for an Order to Show Cause and states: NO APPEARANCES – The Court issues an Order to Show Cause to Rebecca Kerr as to why she should not be removed as Guardian and/or sanctioned for her failure to appear today and failure to provide proof of the funds being placed into a blocked account as ordered. Ms. Kerr is ordered to be personally present in court or appear by CourtCall on 02/04/16. Clerk's Certificate of Mailing shows that Rebecca Kerr was mailed a copy of the 01/07/16 Minute Order on 01/07/16.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>As of 02/01/16, nothing further has been filed in this matter.</p> <p>1. Need Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account (MC-356) or written status report per Local Rule 7.5.</p>
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: JF</p> <p>Reviewed on: 02/04/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 14-Sanders</p>	

Probate Status Hearing RE: Filing of the First and Final Account

DOD: 09/28/14	KATHLEEN E. FOSTER , sister, was appointed Executor with full IAEA and without bond on 12/04/14. Letters Testamentary were issued on 12/04/14.	NEEDS/PROBLEMS/COMMENTS: 1. Need First/Final Account and Petition for Distribution.
Cont. from	Minute Order from 12/04/14 set this status hearing regarding filing of the First and Final Account and Petition for Final Distribution.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Inventory & Appraisal, Final , filed 03/17/15 - \$190,213.83	
Aff.Mail	Status Report Re: Final Distribution filed 01/22/16 states: There are two lawsuits related to this estate currently pending. The estate is being represented by the decedent's insurance carrier in those matters. There is currently a hearing calendared for a demurrer to the second action for failure to follow the creditor's claims statutes prior to filing the lawsuit and then it is contemplated a mediation will be held for a potential settlement within the policy limits of the decedent's insurance. A continuance of a minimum of six (6) months is requested for resolution of the related cases.	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: JF
Status Rpt		Reviewed on: 02/01/16
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 15-Page

Probate Status Hearing RE: Filing of the First and Final Account

DOD: 09/06/14	JO ANN SUTHERLAND and LAURIE SUTHERLAND , daughters, were appointed Co-Administrators with full IAEA and without bond on 12/04/14. Minute Order from 12/04/14 set this status hearing regarding filing of the First and Final Account and Petition for Final Distribution. Inventory & Appraisal, Final , filed 01/15/15 - \$253,071.00	NEEDS/PROBLEMS/COMMENTS: 1. Need First/Final Account and Petition for Distribution and/or current status report.
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 02/01/16
		Updates:
		Recommendation:
		File 16-Sutherland

Probate Status Hearing RE: Filing of the Inventory and Appraisal

DOD: 11/02/14	<p>CARL JOHNSTON, father, filed a Petition for Probate requesting to be appointed as Administrator of the Estate on 04/30/15.</p> <p>Minute Order from hearing on 07/16/15 states: The Court appoints the Public Administrator due to substantial disagreement; Letters are to issue forthwith from the minute order. Mr. Johnston and Ms. Churchill are ordered to turn over any and all paperwork, oral information, and assets to the Public Administrator by 07/23/15. The Court orders that the Public Administrator has the authority to hire counsel for litigation, without paying attorney's fees without Court approval. The Minute Order also set this hearing for filing of the Inventory & Appraisal.</p> <p>Status Report Regarding Inventory & Appraisal filed 12/09/15 states: The Public Administrator has been unable to prepare an Inventory & Appraisal for this estate. It is unclear if real property should be included or not and there is a vehicle out of town. A 60 day continuance is requested.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 12/10/15 Minute Order from 12/10/15 states: Counsel reports that the estate is too small to litigate; they are working on a possible resolution and request 60 days.</p> <p>1. Letters have not been issued to the Public Administrator. Need updated status report and issuance of Letters.</p>
Cont. from 121015		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: JF</p> <p>Reviewed on: 02/01/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 17- Johnston</p>

**Joseph Allen Jensen aka Joseph Allan Jensen aka Joseph A. Jensen
(Def. Succ)**

Case No. 15CEPR00685

Attorney

Helding, Neil A. (for JoAnn Jensen and Christopher Jensen – Petitioners)

First Amended Petition to Determine Succession to Real Property

DOD: 01/24/15		<p>JOANN JENSEN and CHRISTOPHER JENSEN, children, are petitioners.</p> <p>40 days since DOD.</p> <p>No other proceedings.</p> <p>Decedent died intestate.</p> <p>I & A - \$142,000.00</p> <p>Petitioners request Court determination that Decedent's 100% interest in two parcels of real property located In Coalinga, CA pass to them pursuant to intestate succession.</p>	<p>EEDS/PROBLEMS/COMMENTS:</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/o		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: JF</p> <p>Reviewed on: 02/01/16</p> <p>Updates:</p> <p>Recommendation: SUBMITTED</p> <p>File 18-Jensen</p>	

Amended Petition for Appointment of Probate Conservator of the Person

Age: 18		<p align="center"><u>NO TEMPORARY REQUESTED</u></p> <p>RICHARD ELENSKY and BRENDA ELENSKY, parents, are Petitioners and request appointment as co-conservators of the person with medical consent powers.</p> <p>Petitioners state: [see file].</p> <p>Court Investigator Charlotte Bien filed a report on 10/01/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			w/
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input checked="" type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input checked="" type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
<p>Reviewed by: JF</p> <p>Reviewed on: 02/01/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 19-Elensky</p>				

See petition for details.			NEEDS/PROBLEMS/COMMENTS:
			<u>Court Investigator advised rights on 10/23/15</u>
			<u>Voting rights affected – need minute order.</u>
			Continued from 12/17/15. All issues have now been cured.
Cont. from 110515, 121715			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
✓	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 1/29/16
			Updates:
			Recommendation:
			File 20 – Estrada

The General Durable Power of Attorney of A. James Doyle, Jr.

Case No. 15CEPR01071

Attorney
AttorneyBurnside, Leigh W. (for Petitioners DeeAnn Doyle Summers and John Doyle)
LeVan, Nancy J. (for Respondent Christina Fishinghawk)

Probate Status Hearing RE: Filing of an Accounting

	DEEANN DOYLE SUMMMERS and JOHN DOYLE, Daughter and Son, filed Petition to Compel Attorney to Account and Report; for Immediate Suspension of Authority to Act; for Revocation of Power of Attorney; and for Surcharge on 10/27/15.	NEEDS/PROBLEMS/COMMENTS: 1. Need account or written status report per Local Rule 7.5.
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

CHRISTINA FISHINGHAWK, Daughter, filed **Response** on 11/30/15.

Minute Order 12/10/15 states parties agree to an accounting that goes back to 2009. No appearance is necessary at the status hearing if the petition is filed at least two court days prior.

See also **Order Granting Petition** filed 12/16/15. The order requires account from Ms. Fishinghawk, Richard Doyle, and Thomas Borchardt.

Status Report filed 2/1/16 by Attorney Burnside (attorney for Deeann Doyle Summers and John Doyle) states to date she has not received an account and report from Respondent. She did receive an informal account of Richard Doyle and Thomas Borchardt's administration of the A. James Doyle, Jr., Trust, but no account or report of their activities as Mr. Doyle's attorneys-in-fact.

Reviewed by: skc
Reviewed on: 2/1/16
Updates:
Recommendation:
File 21-Doyle

Spousal or Domestic Partner Property Petition

DOD: 09/01/15		<p>DEBORAH CAIN ONEAL, surviving spouse, is Petitioner.</p> <p>No other proceedings</p> <p>Holographic Will dated 08/03/85 states: "I Worth Bradley ONeal, being of sound mind and body leave all my wife Deborah Cain ONeal in the event of my death. In the event of the death of both my wife Deborah Cain ONeal and myself all my belonging and assets shall go to my daughter Tasha Marie ONeal with her Aunt Karen ONeal as guardian and executor of her estate."</p> <p>Petitioner requests court confirmation that that decedent's interest in Ford Financial Group Acct. #xxxx-x579 passes to her pursuant to decedent's will.</p> <p>Declaration of Deborah Cain ONeal in Support of Spousal Property Petition filed 12/30/15 states: She and the decedent were married for 38 years and he had no other marriages during his lifetime. The property seeking to be passed with this Petition was inherited from decedent's parents. Decedent and Declarant executed their holographic wills together. At the time the wills were executed, it was their intent to leave all property, whether community or separate to the other. The language of the will is intended to accomplish that while providing for distribution to their children if they are both deceased.</p> <p>Consent to Spousal Property Petition filed 12/30/15 by Tasha Marie ONeal and Madison Taylor Hunter, children of decedent, consenting to the Spousal Property Petition.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 12/17/15</u></p> <ol style="list-style-type: none"> Petitioner alleges that decedent's will leaves all of his assets to her; however, the wording of the will is unclear. The Order is missing attachment 5a, description of the property to be passed to the surviving spouse. Need revised Order.
Cont. from 121715			
✓	Proof Holo Inst.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail w/		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Petition for Appointment of Guardian of the Person (Initial)

Age: 5		<u>TEMPORARY EXPIRES 02/04/16</u>	NEEDS/PROBLEMS/COMMENTS:
		ROSALIA HERNANDEZ , maternal grandmother, is Petitioner.	1. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Paternal grandfather b. Ramon Hernandez
		Father: ABEL MARTINEZ – personally served on 12/04/15	
Cont. from		Mother: DENETTE HERNANDEZ – personally served on 12/06/15	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Paternal grandfather: UNKNOWN Paternal grandmother: ELVA HERNANDEZ – deceased	
<input type="checkbox"/>	Aff.Mail	x Maternal grandfather: RAMON HERNANDEZ	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.	w/ Petitioner states [see file].	
<input checked="" type="checkbox"/>	Conf. Screen	Court Investigator Dina Calvillo filed a report on 01/29/16.	
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: JF
			Reviewed on: 02/01/16
			Updates:
			Recommendation:
			File 23-Martinez

Petition for Letters of Administration; Authorization to Administer under IAEA

DOD: 8/6/00		3B FARMS, INC. , Interested party, is Petitioner and requests appointment of the FRESNO COUNTY PUBLIC ADMINISTRATOR as Administrator with Full IAEA.	NEEDS/PROBLEMS/COMMENTS: 1. The Court may require clarification as to whether the decedent resided in Fresno or in Sanger. Publication in the Sanger Herald may be required per Local Rule 7.9. 2. Notice to Virginia Shubin Barnett, Daughter, was mailed "C/O" Attorney Roger Nuttall at his office address; however, direct notice to Ms. Barnett is required pursuant to Probate Code §1214 and Cal. Rule of Court 7.51. Therefore, continuance for proper notice may be required. 3. The Court may require a declination to serve from Virginia Shubin Barnett pursuant to Probate Code §8461. 4. Need Letters from Public Administrator. <u>Note:</u> If granted, the Court will set status hearings as follows: <ul style="list-style-type: none"> Thursday, July 7, 2016 for filing the Inventory and Appraisal Thursday, April 6, 2017 for filing the first account or petition for final distribution If the proper items are on file pursuant to Local Rule 7.5, the status hearings may come off calendar.
Aff.Sub.Wit.		Full IAEA – ok	
✓ Verified		Residence: Fresno, CA <u>or</u> Sanger, CA	
Inventory		Publication: Fresno Bee	
PTC		Estimated value of estate:	
Not.Cred.		Personal property: Unknown	
✓ Notice of Hrg		Real property: \$50,000.00	
✓ Aff.Mail	w	Probate Referee: Steven Diebert	
✓ Aff.Pub.		Petitioner states the only known beneficiary, Virginia Shubin Barnett, daughter, has been asked to open a probate but has failed to do so.	
Sp.Ntc.		Petitioner states it is unknown if the decedent died testate or intestate. Although the decedent died in 2000, her only child is uncooperative and has thus far refused to probate this estate.	
Pers.Serv.			
Conf. Screen			
Letters	x		
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Petition for Probate of Will and for Letters Testamentary with IAEA

DOD: 6/24/15		GARY J. BETTENCOURT , named executor without bond, is petitioner. Full IAEA – o.k. Will dated: 4/13/1993 Residence: Fresno Publication: Fresno Business Journal Estimated value of the Estate: Personal property - \$124,500.00 Real Property - \$250,000.00 Total - \$374,500.00	NEEDS/PROBLEMS/COMMENTS: Note: If the petition is granted, status hearings will be set as follows: <ul style="list-style-type: none"> Wednesday, July 6, 2016 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Wednesday, April 5, 2017 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit. S/P		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail W/O	Probate Referee: Steven Diebert	
<input checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: KT
Reviewed on: 2/1/16
Updates:
Recommendation: SUBMITTED
File 26-Bettencourt

Petition for Appointment of Temporary Guardian of the Person

Age: 17		GENERAL HEARING: 03/22/16		NEEDS/PROBLEMS/COMMENTS:	
		ELAINE POOL , sister, is Petitioner.		1. Need <i>Notice of Hearing</i> . 2. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Amanda Pool (minor) b. Teddy Pool (father) c. Nora Ramirez (mother)	
		Father: TEDDY POOL			
		Mother: NORA RAMIREZ			
Cont. from		Paternal grandfather: JIMM POOL			
	Aff.Sub.Wit.	Paternal grandmother: KATHLEEN POOL			
✓	Verified	Maternal grandfather: JOHNNY MARTINEZ			
	Inventory	Maternal grandmother: GLORIA MARTINEZ – deceased			
	PTC	Siblings: VINCENT POOL, BRADLEY POOL, DARREN POOL			
	Not.Cred.	Petitioner states [see file].			
	Notice of Hrg				
	Aff.Mail				
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.				
✓	Conf. Screen				
✓	Letters				
	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
				Reviewed by: JF	
				Reviewed on: 02/01/16	
				Updates:	
				Recommendation:	
				File 27-Pool	

Attorney Trift, Deloise E., of Garden Grove (for Deloise E. Kochevar)

First Amended Spousal or Domestic Partner Property Petition

DOD: 12/8/2010	DELOISE E. KOCHEVAR , surviving spouse, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 111915, 012116	No other proceedings.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Need copy of Decedent's Will	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Aff.Mail	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

Petitioner states no facts (per Item 7 of the *Petition*), upon which Petitioner bases the allegation that the property described in *Attachment 7(a)* and *7(b)* is property that should be confirmed to the Petitioner as surviving spouse.

Petitioner requests Court determination that ½ interest in real property located at 4286 W. Cardiff Ave., Fresno, passes to her, and Court confirmation that ½ interest in the real property belongs to her.

NEEDS/PROBLEMS/COMMENTS:

OFF CALENDAR
Request for Dismissal entered 1/27/2016.

The following issues relate to the First Amended Petition filed 10/1/2015:

- Item 4(c) of the *Petition* is incomplete re: whether Decedent was intestate or testate, and if testate, a copy of Decedent's Will must be attached to the *Petition*. Decedent's original Will was deposited with the Court on 3/28/2014; however, a copy of the Will has not been attached to the *Petition* as required, and the *Petition* requires an answer.
- Need Notice of Hearing and proof of service by mail of the Notice of Hearing pursuant to Probate Code § 13655(a)(2) for all persons listed in Item 9 of *Petition*, as follows:
 - SEAN ROBERTS;**
 - RISA ROBERTS.**

~Additional page omitted~

Reviewed by: LEG
Reviewed on: 2/1/16
Updates:
Recommendation:
File 28 – Kochevar

Petition for Appointment of Temporary Guardian of the Person

Brittany, 5	<u>TEMPORARY EXPIRES 02/04/16</u>		NEEDS/PROBLEMS/COMMENTS:
Jasmine, 16	<u>GENERAL HEARING: 03/08/16</u>		
	BRENDA TILSON , maternal grandmother, is Petitioner.		CONTINUED FROM 01/21/16 Minute Order from 01/21/16 states: The temporary petition is granted to preserve the status quo. The Court orders the Court Investigator to interview all parties and report back to the Court as to whether or not temporary orders should continue to the general petition date. Any written objections and copies of existing orders are to be filed and properly served.
	Father (Jasmine): DONALD JACK LEIFFER		
Cont. from 012116	Father (Brittany): JEFFREY SCOTT JONES		1. Need proof of personal service at least 5 court days before the hearing of Notice of Hearing with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> or Consent & Waiver of Notice or Declaration of Due Diligence for: a. Donald Jack Leiffer; Note: Proof of service filed 01/22/16 is incomplete. None of the information is filled out including when the documents were served. Further, the proof of service is for service by mail. Parents are to be personally served, service by mail is insufficient. b. Jeffrey Scott Jones; Note: Declaration of Due Diligence attaches a people finder search, but does not state anything else or the outcome of the search.
<input type="checkbox"/> Aff.Sub.Wit.	– Declaration of Due Diligence filed 01/22/16		
<input checked="" type="checkbox"/> Verified	Mother: ANGELA LEIFFER – personally served on 01/08/16		2. Need CI report (CI to provide).
<input type="checkbox"/> Inventory	Paternal grandparents (Jasmine): UNKNOWN		
<input type="checkbox"/> PTC	Paternal grandparents (Brittany): UNKNOWN		Reviewed by: JF
<input type="checkbox"/> Not.Cred.	Maternal grandfather: BILLIE TILSON		
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner states [see file].		Reviewed on: 02/01/16
<input type="checkbox"/> Aff.Mail			Updates:
<input type="checkbox"/> Aff.Pub.			Recommendation:
<input type="checkbox"/> Sp.Ntc.			File 29- Jones & Leiffer
<input checked="" type="checkbox"/> Pers.Serv. w/			
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report x			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input checked="" type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			